

**SELF-SUFFICIENCY MATRIX:
AN ASSESSMENT AND MEASUREMENT TOOL
FOR BOULDER COUNTY COMMUNITY SERVICES
AND HOUSING PROGRAMS**

**Developed by the OMNI Institute
on behalf of Boulder County Community Services**

June 2009



OMNI

899 Logan St. Suite 600
Denver, CO 80203
303-839-9422
303-839-9420 (fax)
www.omni.org

BACKGROUND TO THE SELF-SUFFICIENCY MATRIX

The Boulder County Self-Sufficiency Matrix was adapted from the Self-Sufficiency Matrix, which was created by the Self-Sufficiency Taskforce of Snohomish County in 2004. This matrix was based on the federal outcomes standard ROMA (Results Oriented Management and Accountability). The outcomes standards compliment the work of Dr. Diana Pearce, who developed a Self-Sufficiency Standard in the 1990s. The Boulder County measure also draws from versions of the matrix that are used across the country, namely in Arizona and Connecticut. The Boulder County version of the measure (in horizontal, landscape format) was based on the measure by the United Methodist Outreach Ministries.¹

The original matrix out of Snohomish County contained 25 domains, or key benchmarks, which were determined to be critical components of self-sufficiency. Based on feedback from Boulder County, the required domains on the Boulder version were reduced to 10 in order to capture the most relevant local data. Consistent with ROMA, each domain is scored on a continuum from “in-crisis” to “thriving.” Also based on feedback from Boulder County, additional domains were added as optional to enable organizations to tailor the matrix to fit their clients and services.

INSTRUCTIONS

As outlined by the Snohomish County Self-Sufficiency Taskforce, the Self-Sufficiency Matrix can be used for five primary purposes:

- 1) as a **CASE MANAGEMENT TOOL** for case workers as they work with individual clients and document progress towards self-sufficiency over time at specific intervention points or, when appropriate, to document a client’s ability to maintain a certain level of functioning. The Matrix is an effective and efficient tool for documenting the progress or maintenance of client skills and abilities by providing a clear illustration of where a client has strengths, as well as where to focus additional energy to generate improvement.
- 2) as a **SELF-ASSESSMENT TOOL** for individuals who wish to determine their own strengths and areas for improvement as they work towards self-sufficiency. This application of the tool is similar to its use as a case management tool.

¹ Sources:

“Self-Sufficiency Matrix-An Assessment and Measurement Tool Created Through a Collaborative Partnership of the Human Services Community in Snohomish County.” Created by the Snohomish County Self-Sufficiency Taskforce 2004. http://www.co.snohomish.wa.us/documents/Departments/Human_Services/Community/Self-SufficiencyMatrix-CompleteinWord.doc

“The Self-Sufficiency Standard”

<http://www.sixstrategies.org/sixstrategies/selfsufficiencystandard.cfm>

“Self-Sufficiency Matrix Background and Purpose”

http://www.roma1.org/files/rtr/UWSC_Draft_self-sufficiency_taskforce_fact_sheet.doc

Psychometric Results of the Arizona Homeless Program Evaluation Pilot Project

http://www.hrsa.gov/homeless/pa_materials/nlm/flaherty_handout_3.pdf

- 3) as a **MANAGEMENT TOOL** for programs and agencies to determine what is and isn't working in terms of the type of services offered to clients and the way those services are delivered. The Matrix allows program staff to identify where additional resources are needed and how to deploy those resources most effectively.
- 4) as a **MEASUREMENT TOOL**, both for funders and organizations that receive grant funding. The Matrix provides funders a way to clearly articulate their funding priorities to interested applicants and to the community at-large by using specific scales on the matrix to articulate funding priorities or primary interests. For programs that are widely using this tool, the Self-Sufficiency Matrix can serve as a way to consolidate outcomes for multiple clients and report results to funders.
- 5) as a **COMMUNICATION TOOL** for demonstrating the success of local programs, as well as sharing information about community conditions with both the general public and policymakers. As use of the Matrix continues to grow, it promises to be an effective communication tool for illustrating the strengths, as well as weaknesses, of the community to help families work towards self-sufficient living. In addition, a collective analysis of the results generated by programs using the Self-Sufficiency Matrix will aid the community and policy makers in their understanding of what self-sufficiency looks like in Boulder County, what barriers exist for families working towards self-sufficiency, and where system-level efforts are required to improve opportunities for low-income working families.²

While the matrix presented here has been specifically tailored to the needs of Boulder County, its main applications remain the same. This section provides general information about the organization and elements of the matrix, as well as its use.

Organization and Elements

The Boulder County matrix includes 23 total domains, 10 of which are common for all programs and clients in Community Services and Housing programs, and 13 of which are optional, to be selected based on each individual program focus. Each domain can be assessed on a standard five-level scale ranging from “in crisis” to “thriving.” As can be seen below, the matrix also includes domain-specific definitions for each of the five levels, which are intended to assist the user in accurately assessing each individual client. Along the left-hand side is the place to record the date that the assessment was made as well as the rating (1-5). There is space to record two additional follow-up assessments, which would ideally occur quarterly. There is a not applicable (N/A) option available for some of the common domains. This was requested by specific programs in Community Services that serve special populations in which these categories will not apply.

² “Self-Sufficiency Matrix-An Assessment and Measurement Tool Created Through a Collaborative Partnership of the Human Services Community in Snohomish County.” Created by the Snohomish County Self-Sufficiency Taskforce 2004. http://www.co.snohomish.wa.us/documents/Departments/Human_Services/Community/Self-SufficiencyMatrix-CompleteinWord.doc

Figure 1: Matrix Excerpt

Standard Scale					
DOMAINS	In Crisis (1)	Vulnerable (2)	Safe (3)	Stable (4)	Thriving
ACCESS TO SERVICES	(1) Unable to articulate needs, unaware of resources, services not available in area or barriers prevent access.	(2) Knows needs and where to obtain services but barriers prevent access, assistance required.	(3) Knows needs and where to obtain services, has a few barriers that prevent access.	(4) Receiving services but choices are limited.	(5) No longer needs services or is obtaining a full range of services wanted and needed.
<i>Date:</i> <i>Rating:</i>					
<i>Date:</i> <i>Rating:</i>					
<i>Date:</i> <i>Rating:</i>					
Domain-specific Scale Definitions					

Below is a brief description of the focus of each domain included in the Boulder County matrix:

Common Domains for use in Community Services and Housing Programs

- **Access to Services:** Assesses the participants’ knowledge and ability to get the type of services they need to meet their individual or family needs.
- **Food:** Assesses the client’s ability to obtain appropriate food, both in terms of knowledge about how to access food and financial resources to purchase the food if necessary.
- **Housing:** Assesses the ability of the client to obtain appropriate housing of choice based on their circumstances.
- **Income:** Assesses the income adequacy of the client to meet basic needs, as well as to save and potentially make some non-essential purchases.
- **Employment:** Assesses the nature of the job or career in which the client is employed and considers the permanency and stability of the employment, as well as the benefits that accompany the employment.
- **Safety:** Assesses two separate elements of safety. The first is the nature of the individual’s personal relationships with regard to overall safety and well-being. The second is the safety of one’s immediate living environment and neighborhood or community.
- **Transportation:** Assesses whether or not the individual has appropriate, safe, and reliable access to transportation (whether by car, bus, or reliance on friends and family).

- **Health Care Access:** Assesses need for health care, as well as access to both health care and medical insurance coverage for all family members.
- **Adult Education:** Assesses adult academic, institution-based achievements. The Career Resiliency/Training Scale reflects some of the less structured skills that are important to career development.
- **Child Education:** Assesses both access to and engagement in educational institutions by any and all children in the family.

Optional Domains

- **Childcare:** Assesses the client's ability to obtain appropriate childcare, both in terms of access to the childcare and financial resources to purchase the childcare.
- **Parenting Skills:** Assesses the individual's skills and approach to child-rearing and is focused on the parent's perceived abilities rather than the child's behavior.
- **Support System:** Assesses the nature of the individual's immediate interpersonal relationships, especially the extent to which they form a foundation for the individual in times of crisis.
- **Substance Use:** Assesses whether or not the individual is using alcohol and/or prescription drugs in an appropriate manner. Any use of illicit drugs are considered in-crisis and unsafe.
- **Physical Health:** Assesses the general physical well-being of the client.
- **Mental Health:** Assesses the emotional well-being of the client.
- **Career Resiliency/Training:** Assesses the skills and abilities a client has for achieving and sustaining a career given the changing dynamics of the workforce.
- **Functional Ability:** Assesses whether or not the client is able to perform Activities of Daily Living (ADLs). ADLs refer to basic skills of daily living, including bathing, eating, and dressing.
- **English Language Skills:** Assesses the English speaking ability of client's for whom English is a second language.
- **Criminal Justice:** Assesses both past and present involvement with law enforcement and other elements of the criminal justice system.
- **Legal:** Assesses whether or not the client has any pressing legal issues and, if so, whether or not they have the knowledge, skills, and resources to work towards getting the legal issues resolved.
- **Community Involvement:** Assesses community and/or school-based engagement and activities.
- **Utility Assistance:** Assesses stability of utility services for the individual/family, including ability to pay for expenses associated with these services.

Using the Matrix

The design and layout of the matrix is intended to enable case managers and clients to track both status at a given point in time, as well as *progress* over time. Further, by assessing multiple domains at one time, the matrix enables users to identify potential linkages or relationships among different domains. As a result, this approach provides a more holistic and dynamic picture of a client's

progression relative to self-sufficiency, thereby contributing to efforts to provide appropriate and relevant support to each client on an individual basis.

The matrix is intended as a case management tool, to be completed through on-going conversations with clients rather than a self-administered survey. A worksheet for each domain is provided below with key issues to consider and guiding questions for use with clients. These questions are offered as suggestions only; caseworkers should be encouraged to use their skill and judgment to assess each domain in an appropriate manner suited to their client population.